



VIEW CUSTOMER ACCOUNTS USER GUIDE

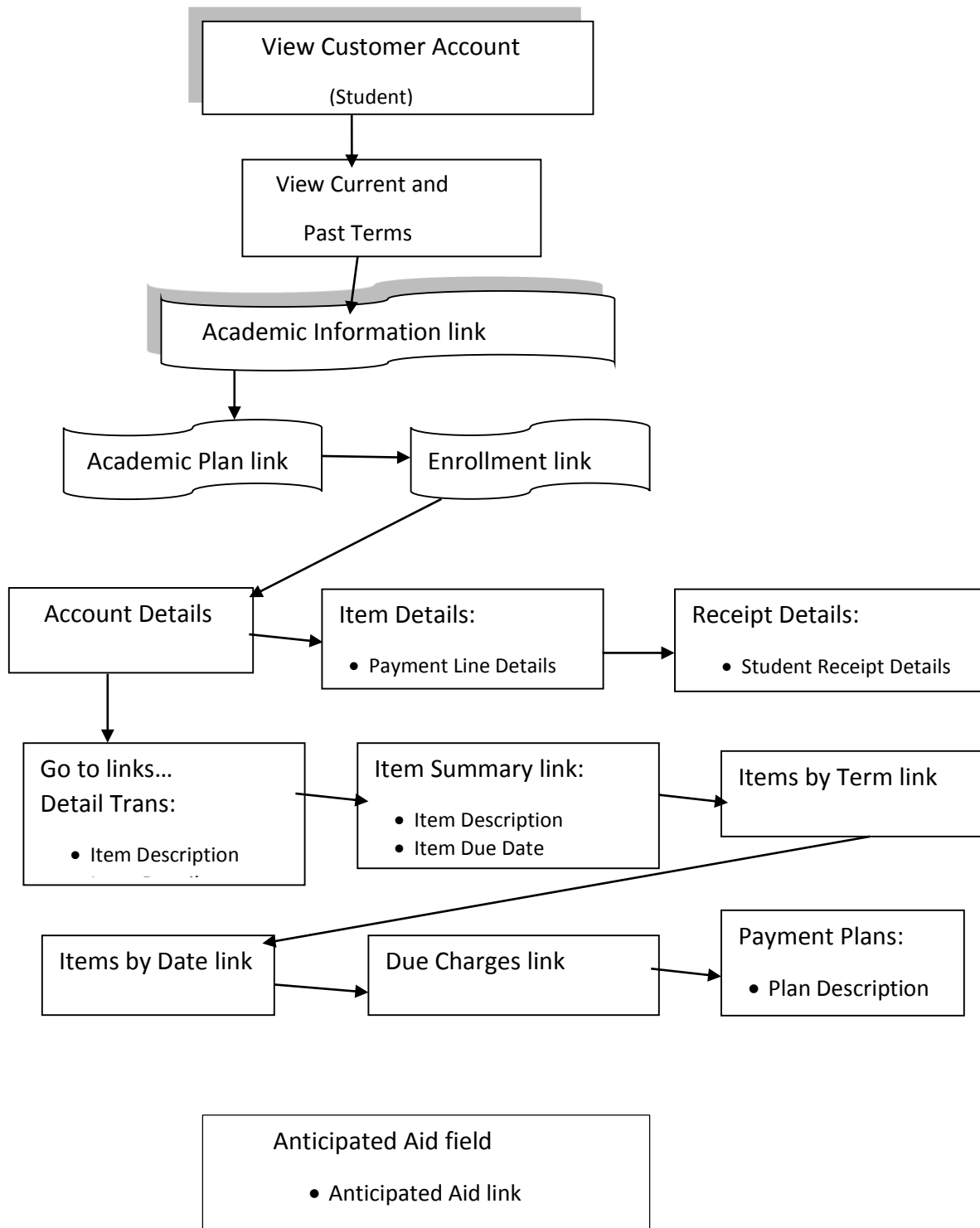
STUDENT FINANCIAL TRANSACTIONS

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Created for UNLV, University of Nevada, Las Vegas

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Flowchart Overview



1.0 View Customer Accounts Overview

The View Customer Accounts page in the Student Financials component, contains detailed financial transactions for every student – for both current and historical Terms, which includes Registration, Mandatory, Course and Special Fees, also Payments, Payment Plans and Third Party Contracts, Refunds and Penalty Fees for Late Registration, Late PPL and Late on Tuition payments.

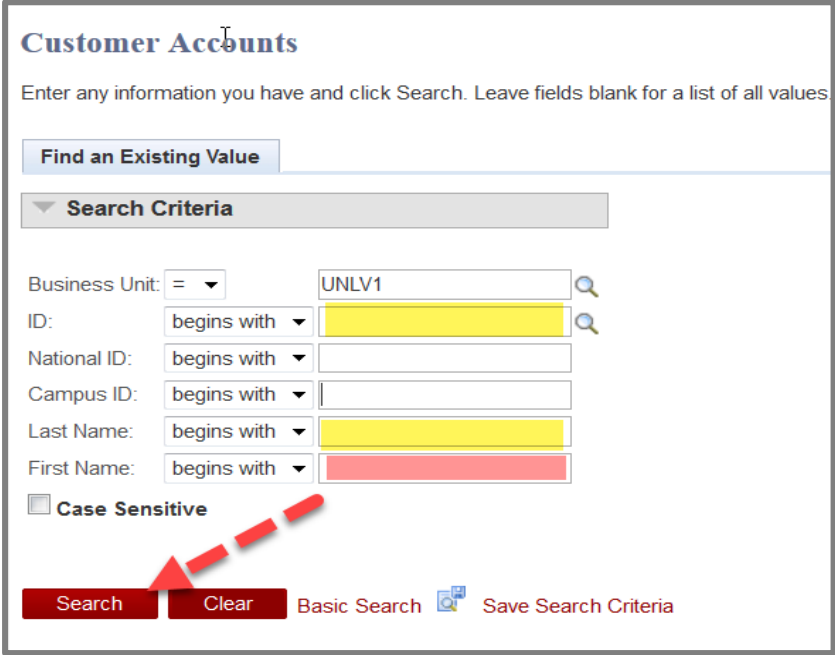
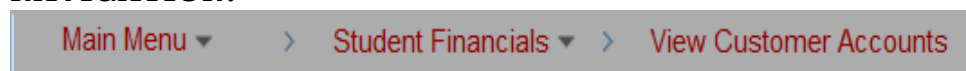
Anticipated Financial Aid is displayed on this page prior to disbursement on students account (link on page displays only prior to disbursing).

Also displayed are Waivers, Refund information.

Registration Fees are split as Reg I (State) and Reg II (Non State).

1.1 Navigation to View Customer Accounts

NAVIGATION:

A screenshot of the 'Customer Accounts' search interface. At the top, it says 'Customer Accounts' and 'Enter any information you have and click Search. Leave fields blank for a list of all values'. Below this is a button 'Find an Existing Value'. A section titled 'Search Criteria' contains several search fields: 'Business Unit' with a dropdown set to '=' and a text box containing 'UNLV1'; 'ID' with a 'begins with' dropdown and a yellow text box; 'National ID' with a 'begins with' dropdown and a white text box; 'Campus ID' with a 'begins with' dropdown and a white text box; 'Last Name' with a 'begins with' dropdown and a yellow text box; and 'First Name' with a 'begins with' dropdown and a pink text box. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom, there are buttons for 'Search' (highlighted with a red dashed arrow), 'Clear', 'Basic Search' with a magnifying glass icon, and 'Save Search Criteria'.

Note: Set up User Defaults for Business Unit to autofill.

1. Enter student 10 digit NSHE ID.
2. OR enter Last Name and First Name.
3. Click the Search button-this will take you to the Customer Accounts page.

2.0 Customer Accounts


Verify Name and NSHE ID is displayed on page is correct. If the View All link is highlighted, click on link to expand page. You will find this is consistent with accessing most areas within Customer Accounts.



When a student enrolls, a row is inserted called “Tuition.” If the student enrolls in a Payment Plan, another row is inserted above the Tuition, the balance on the tuition row moves to the Payment Plan row with recalculated installment payments. If late fees are assessed on account those remain on Tuition row.






















Customer Accounts

Business Unit: UNLV1

ID: [Redacted] [Academic Information](#) 

Total: 0.00 **Anticipated Aid:** 0.00

[Find](#) | [View All](#) [First](#) [1-7 of 18](#) [Last](#)

Account Type	Account Number	Balance	Open Date	Status	
Payment PI	PPL007 - 2016 Spring	0.00 USD	01/21/2016	Active	Account Details   
Tuition	TERMFE001- 2016 Spring	0.00	01/21/2016	Active	Account Details   
Payment PI	PPL006 - 2015 Fall	0.00	08/19/2015	Active	Account Details   
Tuition	TERMFE001- 2015 Fall	0.00	08/19/2015	Active	Account Details   
Payment PI	PPL005 - 2015 Spring	0.00	01/22/2015	Active	Account Details   
Tuition	TERMFE001- 2015 Spring	0.00	01/22/2015	Active	Account Details   
Payment PI	PPL004 - 2014 Fall	0.00	06/24/2014	Active	Account Details   

Go to: [Detail Trans](#) [Item Summary](#) [Items by Term](#) [Items by Date](#) [Due Charges](#) [Payment Plans](#)

[Return to Search](#) [Notify](#)

- Ensure you select the correct Term to review transactions.

This page contains the following links:

- The Academic Information
- Anticipated Aid
- Account Details for current and historical terms

Go To links: These links display financial information in a different formats.

2.1 Account Details

Account Type	Account Number	Balance	Open Date	Status	
Payment PI	PPL007 - 2016 Spring	0.00 USD	01/21/2016	Active	Account Details
Tuition	TERMFEEO01- 2016 Spring	0.00	01/21/2016	Active	Account Details

- Click on the Account Details link for Term, ensure you select the Tuition row to view all transactions.

Account Details

a ID:

b Business Unit: UNLV1

c Account Number: TERMFEEO01- 2016 Sprg

d Account Balance: 0.00

e Debits: 0.00

f Credits: 0.00

g Applied: 0.00

h Unapplied: 0.00

- ID: This field displays the NSHE ID number and name of student.
- Business Unit auto fills from Search page.
- Account Number: Displays the Term you are viewing.
- Account Balance: This field displays the outstanding balance or credit balance (Refund).
- Debits: This Field displays the total amount of debits (charges) to the account.
- Credits: This field displays the total amount of credits (payments) to the account.
- Applied: This field displays the total amount of payments applied to charges on the account.
- Unapplied: This field displays the total amount of payments not applied to charges on the account. Use the functionality of Payment Applier or Table Validation to “fix” account.

2.2 Item Details

Item	Term	Amount	
Class	Installment ID	Last Activity Date	Balance
GIA Class Reg Fee II Waiver UG	2017 Sumr	03/24/2017	-24.00 0.00
GIA Class Ugnd Reg Fee I Waive	2017 Sumr	03/24/2017	-1,335.00 0.00
Health Charge Fee Waiver	2017 Sumr	03/24/2017	-37.00 0.00
Acad Success Initiative Fee	2017 Sumr	03/23/2017	25.00 25.00

- Click on the Item Details of any displayed transaction to “drill down.” The Payment Line Details displays what charges were paid by that “code type”

2.3 Payment Line Details

Charges this Payment paid

Payment Line Details

ID: [REDACTED] Business Unit: UNLV1
 Item Nbr: 000000000000272 GIA Class Reg Fee II Waiver UG Payment ID Nbr: 46

Item Amount: -24.00 Applied Amount: -24.00 Balance: 0.00
 Reference Nbr: Item Type: 600000000047

Account Split for Payment Find | View All First 1 of 1 Last

Account Nbr	Account Term	Item Term	Item Amount
TERMFEE001	2017 Summer	2017 Summer	-24.00

Details Find | View All First 1 of 1 Last

Nbr	Posted	Effective	Billed	Due	GL Posted	Reference Nbr	Amount
1	03/24/2017	03/24/2017	03/24/2017	03/25/2017	03/24/2017	6:30:19PM	-24.00

Charges this Payment paid Find | View All First 1-2 of 2 Last

Item Type	Account Nbr	Term	Date	Amount
Summer - Ugrd Reg Fee II	TERMFEE001 2017 Sumr	2017 Sumr	03/24/2017	16.00
Summer - Ugrd Reg Fee II	TERMFEE001 2017 Sumr	2017 Sumr	03/24/2017	8.00

Return

- Waivers or Payments are set up to pay certain fees.

2.4 Academic Information

Academic Program contains Bio/Demo Data and Career Tem Data.
 The most current Term is listed first.

Customer Accounts

Academic Information

Bio/Demo Data

ID: [REDACTED] Name: [REDACTED]
 Campus ID: Gender: Female

Citizenship Find | View All First 1 of 1 Last

Country	Description
United States	Citizen

National ID Find | View All First 1 of 1 Last

NID Type	National ID
Social Security Number	[REDACTED]

Career Term Data Find | View All First 1-4 of 10 Last

Term	Career	Prim Prog	Residency Group	Units Tot	Units Level	Acad Load
2017 Fall	UGRD	Undergrad	In State Undergrad	0.000 32.000	Senior	No Units Academic Plan Enrollment
2017 Sumr	UGRD	Undergrad	In State Undergrad	8.000 32.000	Senior	Half-Time Academic Plan Enrollment
2017 Sprg	UGRD	Undergrad	In State Undergrad	0.000 24.000	Senior	No Units Academic Plan Enrollment
2016 Fall	UGRD	Undergrad	In State Undergrad	6.000 24.000	Senior	Half-Time Academic Plan Enrollment

Return

- Page lists each Term< Career, Residency, number of units enrolled and Level (Freshman, Junior, Senior) and Academic Load (Total Units to date).

2.5 Academic Plan

Academic Plan page displays current and historical Academic Plan and Sub Plan of student.

Academic Information
Academic Plan

ID: [REDACTED] Career UGRD

Find | First 1 of 3 Last

Acad Plan	Declare Date	Req Term	Completion Term
Anthropology MIN	03/03/2017	2014 Fall	

Find | View All First 1 of 1 Last

Academic Sub-Plan	Requirement Term	Declare Date
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Return

- Use the arrow to view next page for historical Plans.

2.6 Enrollment Summary

The Enrollment Summary page contains current and historical enrollment-select the Term you want to view from the link on the Academic Information page.

Academic Information
Enrollment Summary

ID: [REDACTED]

Find | View All First 1-2 of 2 Last

Class #	Subject	Catalog Component	Session Census Date	Section	Status	Reason	Basis	Prog Units	Add Date
52315	Class Info SOC	403	Summer 2	1001	Enrolled	Enrolled	Graded	4.00	03/23/2017
	Tech Soc Research	Lecture						4.00	
53516	Class Info SOC	404	Summer 3	1001	Enrolled	Enrolled	Graded	4.00	03/23/2017
	Stat Meth Soc Sci	Lecture						4.00	

Find | View All First 1-3 of 3 Last

Class #	Subject	Catalog Component	Session Census Date	Section	Status	Reason	Basis	Prog Units	Add Date
87498	Class Info ANTH	436	Regular	1001	Dropped	Drop Wait	Graded	3.00	08/22/2016
	History of Anthro	Lecture							
						Student Drop		3.00	08/30/2016

Return

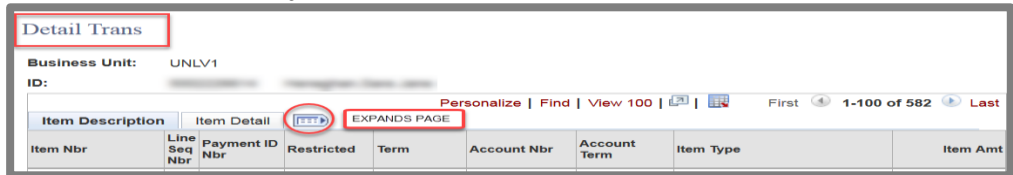
- This page displays status of enrollment for each class Added or Dropped or Withdrawn.

3.0 Go To Links

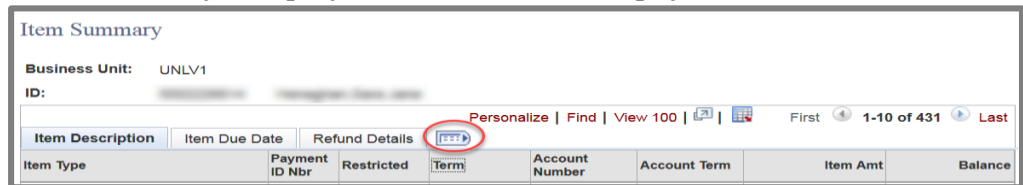
The Go To links display all financial transactions from Account Details in different formats.



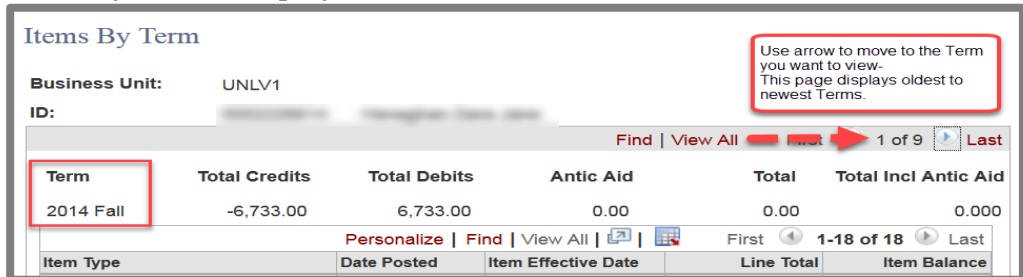
- a. Detail Trans: Sort by Term



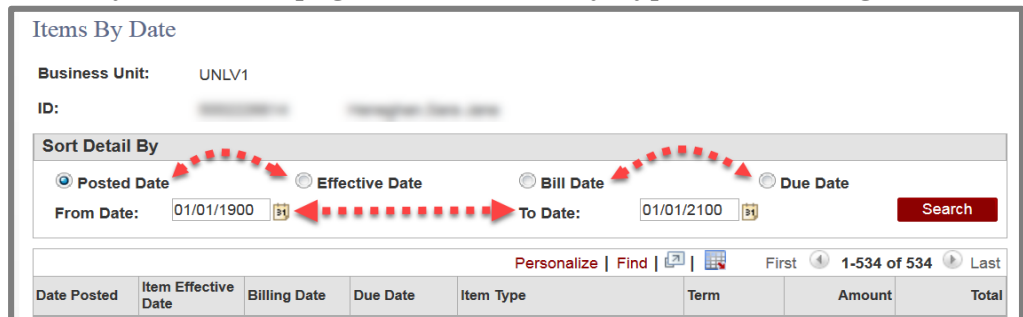
- b. Item Summary: Displays transactions-fees, payments and waivers



- c. Items by Term: Displays balance of each transaction on account.



- d. Items by Date: This page can be sorted by Type or Date range.



- e. Due Charges: Displayed are the Due Dates for all Charges and Fees.

Due Charges

Business Unit: UNLV1
ID: XXXXXXXXXX XXXXXXXXXX

By Due Date Find | View 3 First 1-4 of 4 Last

Due Date	Due Amount	Total Due
01/10/2017	562.18	562.18
05/12/2017	112.00	674.18
06/02/2017	175.88	850.06
07/07/2017	628.88	1,478.94

By Item Find | View All First 1-3 of 13 Last

Item Type	Item Term	Account Nbr	Account Term	Due Date	Due Amt	Total Due
Financial Aid Refund	2017 Sprg	TERMFEE001	2017 Sprg	01/10/2017	562.18	562.18
Undergrad Student Services Fee	2017 Sumr	TERMFEE001	2017 Sumr	06/02/2017	4.00	566.18
Undergrad Student Services Fee	2017 Sumr	TERMFEE001	2017 Sumr	07/07/2017	4.00	570.18

Return

- All fees have different due dates-if student is on a Payment Plan the fees would be in installment payments with a due date depending on plan selected. The fees are recalculated in even installments.

- f. Payment Plan: Displayed are current and historical Payment Plans and Third Party Contracts-Active or Cancelled.

Payment Plan

Business Unit: UNLV1
ID: XXXXXXXXXX XXXXXXXXXX

Personalize | Find | View All | First 1-4 of 4 Last

Plan Description Plan Detail

Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status
2168_4PAY_PLAN_13DUE	4 Payment Mid Plan - Fall 2016	Payment Plan	Calculated		Active
2168_VERIZON_WIRELESS	Fall 16 Verizon Wireless	Third Party		SF000000043	Active
2172_VERIZON_WIRELESS	Spring 17 Verizon Wireless	Third Party		SF000000043	Active
2175_VERIZON_WIRELESS	Summer 17 Verizon Wireless	Third Party		SF000000043	Active

Return

Contract Nbr	Contract Description	Contract Type	Plan Type	External Org ID	Contract Status
2108_4PAY_TMS	Fall 2010 4 Pay TMS PP	Payment Plan	Calculated		Cancelled
2118_3PAY_PLAN	3 Payment Plan - Fall 2011	Payment Plan	Calculated		Cancelled

- When a contract is Cancelled the fees revert back to the Tuition row for Payment Plans.
- A Third Party Contract is a contract created when a Corporation agrees to pay the student's tuition; all, part or certain fees based on criteria agreed upon. A payment is made on student account. If the contract is Cancelled the student incurs all the fees back on account.

4.0 Anticipated Aid

The Anticipated amount posted on student account is displayed prior to disbursing, the FA will pay Tuition or will be a Refund to the student. Once the FA is disbursed the link to View Anticipated Aid disappears.

Customer Accounts

Business Unit: UNLV1

ID: [Redacted] Academic Information ★

Total: -1,213.65

Anticipated Aid: 2,427.30

Find | View All First 1-7 of 9 Last

Account Type	Account Number	Balance	Open Date	Status	
Tuition	TERMFEE001- 2017 Spring	-1,213.65 USD	11/07/2016	Active	Account Details
Tuition	TERMFEE001- 2016 Fall	0.00	05/06/2016	Active	Account Details
Tuition	TERMFEE001- 2015 Summer	0.00	03/16/2015	Active	Account Details
Tuition	TERMFEE001- 2015 Spring	0.00	11/04/2014	Active	Account Details
Tuition	TERMFEE001- 2014 Fall	0.00	04/16/2014	Active	Account Details
Tuition	TERMFEE001- 2014 Spring	0.00	11/05/2013	Active	Account Details
Tuition	TERMFEE001- 2013 Fall	0.00	04/22/2013	Active	Account Details

Go to: Detail Trans Item Summary Items by Term Items by Date Due Charges Payment Plans **View Anticipated Aid**

Return to Search Notify

4.1 View Anticipated Aid

Anticipated Aid Details

Find First 1 of 1 Last

Term: 2017 Spring Term Total: 2,427.30

Find | View All First 1-2 of 2 Last

Item Type	Career	Date	Apply Dt	Expire Dt	Net Award
Men's Swimming Stipend	UGRD	12/09/2016 4:04:44PM	04/12/2017	08/10/2017	1,213.65
Men's Swimming Stipend	UGRD	12/09/2016 4:04:44PM	03/08/2017	07/06/2017	1,213.65
VA Anticipated Payment	UGRD	02/01/2017 12:29:31PM	02/01/2017	04/17/2017	3,031.64

Return

- The detail page displays what type of FA the student is receiving- Loans, Sub Loans or Scholarships and Stipends.

5.0 Icons on Customer Accounts

Icons found on certain pages throughout MyUNLV are “short cuts” to each main page component. Click on the icon to access.

- The “no smoking” icon is a Negative Service Indicator (notification)
- The “star” icon is a Positive Service Indicator, usually is a notification to prevent a process action.

The screenshot displays the 'Customer Accounts' interface. At the top, it shows 'Business Unit: UNLV1' and a red box labeled 'SERVICE INDICATORS Negative - Positive'. Below this, there are fields for 'ID:' and 'Academic Information' with a red star icon. The 'Total:' is 232.82 and 'Anticipated Aid:' is 0.00. A table lists account details with columns: Account Type, Account Number, Balance, Open Date, and Status. The first row shows 'Tuition' for 'TERMFEEO01- 2017 Summer' with a balance of '232.82 USD' and status 'Active'. To the right of the table, there are icons for 'Account Details' (a red 'X'), a red star, and a speech bubble icon (circled in green).

Account Type	Account Number	Balance	Open Date	Status
Tuition	TERMFEEO01- 2017 Summer	232.82 USD	03/20/2017	Active

Note: The Add a New Communication and Checklist icon are not used for individual use. These are applied in Mass.

- The Add a New Comment “bubble” can be accessed to add comment to student account.